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ABSTRACT

This guide focuses on moderating non-pedagogical online conferences that use World Wide Web-based conferencing software, whether synchronous or asynchronous. The first section provides information on getting ready and discusses features and advantages of synchronous and asynchronous systems. The second section focuses on getting started, including determining objectives, making decisions about the conference itself, clarifying expectations, and technical support. The moderator's responsibilities are addressed in the third section, including organizational, social, and intellectual concerns. The fourth section describes factors that influence the outcome of an online conference, including the characteristics of the participants, their motivation, and the characteristics of a moderator. An appendix lists resources. (AEF)

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Playing Croquet with Flamingos: A Guide to Moderating Online Conferences

by Lyndsay Green

May 28, 1998

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Human Resources Development Canada / Développement des ressources humaines Canada
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Playing Croquet With Flamingos: A Guide to Moderating Online Conferences

by Lyndsay Green

"I think that is the lesson to be learned from computer conferencing — it has its own direction: it is very difficult to control. It is something like Alice's effort to play croquet with live flamingos — they [were] alive! That's what happened in the conference — it was alive and, therefore, not controllable. On the other hand, it developed much more enthusiastically and satisfyingly than I ever expected."[1]

About This Guide

This is the resource I wish I'd had when I moderated my first online conference in 1997. I was an experienced face-to-face moderator and content expert, hired to moderate an online conference on social access to learning technologies. The experience was so challenging and so rewarding that I was hooked. Over the year, I moderated another four online conferences and read everything I could get my hands on about moderating this kind of conference. I was delighted to come across the quote from Dr. Richard Farson at the beginning of this guide, which inspired the title, because it so eloquently sums up the mix of elation and dismay I felt, and still feel, when moderating online. In this guide, I've tried to pull together what I've learned to help you get ready to moderate your own online conference.

First, let's clarify the terminology. This guide is about moderating online conferences that use Web-based conferencing software, whether synchronous (often called "chat") or asynchronous. (See Getting Ready, on the following page.) The use of Web-based software allows anyone with access to the Internet and a Web browser to go to the conferencing Web site and access the conference. (A list-server, also used for conferencing, sends e-mail messages directly to conference participants, who receive them as incoming mail.)

This guide focuses on moderating non-pedagogical conferences, that is to say online gatherings which are not part of a formal course or instructional package. There are important differences between moderating an online classroom and moderating an online meeting, not the least of which is the difference in motivation of the participants. (See Influencing Factors on page 20.)

Getting Ready

The best way to approach online conferencing is to recognize it for what it is — a brand new communication medium. Our tendency is to do the opposite — to overlay it with the structures we know. Participants using this medium will not respond in the same way they do in a face-to-face meeting. You, as the moderator, will have access to different resources. It's important that you free yourself from old paradigms, and be receptive to the strengths and weaknesses of this new medium. That way, you'll be better able to push the medium to its limits, while at the same time, setting realistic expectations. More about this later.

To gain a better understanding of the medium, register as a participant in an online conference. The NODE (http://node.on.ca/conferencing) usually has a public access conference on the go. You'll be able to watch the conference proceedings unfold and evaluate the moderating role. You can participate, but you can also "lurk" (i.e., watch the proceedings without inputting any comments).

Once you have an understanding of online conferencing in general, you'll need to familiarize yourself with the features of the particular conferencing software you'll be using. The conferencing software I'll be referring to is generally very user-friendly. You can acquire a good functional grasp of its basic features quite quickly. Mastering the medium, however, can take many more hours of use. Before you start moderating, find a way to practice with the software; that way, you'll be comfortable with its features.

Synchronous vs. Asynchronous

Conferencing softwares vary; they're used to create different environments and feature different moderators' tools. The most significant characteristic in terms of functionality is whether the conference is synchronous or asynchronous.

Of the five conferences I've moderated, one was synchronous, the rest asynchronous. With an asynchronous conferencing facility, people can post messages at any time, day or night. You can opt for a structured approach to organizing the proceedings by posting under different content items or threading. For a look at two examples of asynchronous conferencing software — Caucus and Allaire Forums — visit the NODE Web site.

With synchronous software, everyone is online, live at the same time. Different "rooms" or conferences can be created in which focused discussions can take place. That said, it's not as easy to structure a discussion as it is with an asynchronous conferencing facility. For an example of a synchronous conferencing software, visit Ingenia's MOO at http://moo.schoolnet.ca/moo/webroom/about.html

There is a significant difference in the two experiences; both modes have their strengths and weaknesses. Dr. Robin Mason, Senior Lecturer at the Institute of Educational Technology (IET) in Britain and Head of the Centre for Information Technology in Education, wrote the best summary I've found comparing the two modes. It's in "The Globalisation of Education," which you'll find on the NODE Web site at http://node.on.ca/conference/fieldnotes Although Mason compares the two in the educational context, her findings are applicable here, as well.

Mason concludes that the four crucial advantages of the asynchronous media, in descending order of significance, are:

- flexibility — access can take place at any time;
- time to reflect;
- situated learning — the learner can easily integrate the ideas being discussed with the working environment; and
- cost-effective technology.[2]

The four equally compelling advantages to synchronous systems are:

- motivation — synchronous systems focus the energy of the group;
- telepresence — real time interaction helps to develop group cohesion;
- good feedback — synchronous systems provide quick feedback on ideas, and support consensus and decision-making; and
- pacing — synchronous events encourage people to keep up-to-date, and provide discipline.

Mason recommends that personal learning styles and the larger educational context dictate the more appropriate medium in a given situation. She has found that the trend is towards combining synchronous and asynchronous media in an attempt to capitalize on the benefits of both.

Turning to asynchronous conferencing software, the major distinguishing feature is whether the discussion is "threaded" or not. In a threaded conference, you're able to post a response immediately following the comment to which you are responding. In a non-threaded conference, separate conference items are opened and comments are posted under each item in the order in which they are posted. The best way to understand this concept is to visit NODE's Web site and compare the Caucus and Allaire Forums conferencing systems. Allaire Forums is threaded, Caucus is not. Some people prefer threading, finding it easier to follow a discussion. That said, people who aren't familiar with threaded discussions may have trouble posting in "the right place."

Other Features

Here are some other important features to look for.

- Can the moderator find out when a participant last signed on, even if a message wasn't posted? (This is a terrific benefit if you want to find out who is "lurking.")
- Can participants type in a URL (a Web address) and automatically create a hot link to another Web site? (This is an excellent way for the moderator and participants to create access to additional resources.)
- Can the moderator control whether or not participants can add new items to the conference? (If they can, the decision can be made as part of the conference design.)
- Can the moderator edit, delete or move comments posted by participants? (These features increase the moderator's ability to structure and control the conference.)
- Can the moderator decide whether participants can edit their own responses? (Again, the decision can be made as part of the conference design.)
- How easy is it to modify the appearance of the site? (Once the conference is underway, will the moderator be able to change the conference greeting and introduction, post content under icons, add colour, bolding or special fonts? For example, we would have liked to use a different font or text size for administrative items, distinct from content, in our synchronous conference.)

- What will participants know about each other? (With some software, participants have the option of setting up a home page featuring phone and fax numbers, e-mail addresses, organizations represented, titles and personal information.)
- Can you e-mail participants within the conferencing environment? (This facilitates communication between you and the participants, and among participants.)
- Can participants be notified by e-mail about new messages to the conference? (This provides an excellent way to remind participants about the conference and encourages them to revisit the site.)
- In a synchronous conference, can the moderator receive private messages from participants? (This was the case with the synchronous software we used. Participants could send a private message to the moderator, but the moderator could not reply privately. With this feature, the moderator can be made aware of the problems participants are having and post general advice for all to see.)
- In a synchronous conference, are logs created so that participants — especially those who cannot attend certain portions — can review the synchronous sessions in an asynchronous manner?

For the purposes of this guide, I'm assuming that you've been assigned a conferencing software. If so, your job is to learn how to use it to maximum effectiveness before the conference starts. If, on the other hand, you're involved in selecting the appropriate conferencing software, be sure to read the companion guide, *Online Conferencing: Lessons Learned*.[3]

Getting Started

First, the Objectives

As with any kind of meeting, you start by setting the objectives. And you do that before drawing up the agenda, identifying the participants and designing the conference. Online conferencing can be used to meet a wide spectrum of goals. Here are some of the objectives outlined for the five conferences I moderated:

- gathering input from experts for the preparation of a document on social access to learning technologies;

- expanding knowledge on workplace learning centres by bringing experts together and sharing collective knowledge;
- receiving input on discussion papers released by the federal government on student assistance reform in preparation for a face-to-face meeting (one of the goals was to maximize the effectiveness of a subsequent face-to-face meeting);
- increasing participants' awareness of "Outcome Assessment in Learning" and providing them with access to experts in the field.

As well:

- In most cases, the medium was used as a vehicle for distributing background or discussion papers.
- In all cases, the goal was to facilitate an exchange of views among participants, which was seen as more valuable than individual contributions.
- In all cases, one of the objectives was to explore the use of the medium itself, and to familiarize participants with the technology.
- All of the conferences offered participants the opportunity to extend their network of contacts in the field.

Decision Points

After setting out objectives, you need to design the conference itself. Decisions have to be made about the conference; as the moderator, you may be responsible for making those decisions or involved in the decision-making process. These decisions include whether the conference will be asynchronous or synchronous, open or closed; decisions must also be made about the length and size of the conference, the use of experts, whether you will circulate information in advance, confidentiality, and whether the conference will be unilingual or not. Remember to keep your objectives front and centre when designing your conference.

Asynchronous or Synchronous?

In some cases, you may have the option of deciding whether the conference should be asynchronous or synchronous. The previous chapter describes and compares the two facilities, and points out that the trend seems to be

towards some combination of the two. For example, you might want to hold a synchronous conference at some point during an asynchronous conference.

Open or Closed?

Based on your objectives, you'll need to determine whether you want the conference to be closed-access or open to the public. Of the five conferences I moderated, three were by invitation only and two were open to the public. That said, all of the conferences were password protected, and required the participant to register a user ID and password. In the closed conferences, registration was by invitation; access was denied to the general public. In the public conferences, everyone could register and the registration took effect immediately.

If you decide to make the forum accessible to the public, you'll need to have a powerful draw such as a topic of burning concern and/or the participation of subject-matter experts. It will be essential to promote the conference effectively to the target audience. For closed conferences, one of the strongest attractions is the chance to share ideas and network with a selected group of colleagues.

You can combine public and private conferences. Our closed forum on workplace learning centres was followed by a public forum on the same topic. The report from the closed session was available on-site at the open conference, and the open forum was launched using the same topic structure.

How Long?

The length of your conference will depend on your objectives, the conference design, and the stamina of your participants and moderator. The five conferences I moderated ranged in length from two days to seven weeks. The most exhausting was the two-day forum, which was synchronous. The co-moderator and I were online for nearly 16 hours, with very few breaks. We were joined by four experts for a two-hour period, during which the entire system crashed because so many messages were being posted. The pace of the seven-week conference was more relaxed, but still required checking in several times a day. (The extended time period reflected a broader consultation process.)

If you're organizing a closed conference to accomplish a specific task, you'll need to set a timeframe that is long enough to accommodate people's professional responsibilities, and short enough to ensure they won't keep putting off participating. You'll need more time if you're crossing time zones. One to two weeks works best for most asynchronous conferences. This gives people enough time for reflective input, and to accommodate other commitments. As well, time constraints encourage synergy. In general, I've found that the people who make a significant contribution find the length of the conference, whatever it is, just right. They seem to pace themselves to accommodate the time available. Others who aren't as involved often want more time, perhaps because of other commitments during the conference period (or a tendency to procrastinate!).

Conference Size

If you opt for a closed conference, you'll need to decide how many participants to invite. The closed conferences I moderated accommodated 20 to 53 registrants. Participation varied greatly. In the largest, only 20 per cent of participants posted messages; the others used the facility to download documents and read others' comments. Most participants posted something during the smallest conference (the number of postings per person varied greatly). If you have a very active group of participants who need to accomplish a task in a short period of time, it's probably best to restrict the number of participants to two dozen or so. People seem to have some difficulty in following lines of thought and keeping one another's identities straight in a larger group.

A participant in one of NODE's online conferences shares my impression as to maximum size: "Recently, I took a commercial online course with over 80 learners registered. Most of us were overwhelmed by the dozens of discussion threads that evolved. Some felt they had to read everything and, when they couldn't keep up, dropped out in frustration. The instructor couldn't keep up with facilitation tasks. I've since concluded that the size of a typical f2f (face-to-face) classroom (20-25) is probably appropriate for online interactions, as well."

However, when applying this rule of thumb, remember that your goal is to have some 20 active participants. Depending on the task and the participatory level of your target group, you may need to invite double that number to obtain the desired interactivity level.

Using Experts

One of the advantages of online conferencing is that you can involve experts from anywhere in the world. We invited experts to the two-day synchronous conference. Four discussion papers were prepared and made available in advance for downloading from the site. The authors were available online for a two-hour period. This opportunity to discuss issues with the experts was a good draw.

For more lengthy asynchronous closed conferences, the introduction of experts should be handled with care in order to safeguard the group cohesion that participants establish. The introduction of a new person, especially an acknowledged expert, should be perceived as contributing to the group's goals. For example, participants are informed in advance of experts' involvement, group cohesion is less likely to be affected negatively.

In most conferences I've been involved with, participants introduced new information themselves during the conference, often by creating links to other Web sites. As moderator, I have sourced new information, often at the request of participants, and introduced it into the conference.

Circulating Information in Advance

You'll have to decide whether — and how — to circulate information to participants in advance. Asking participants to download information from the site can be a way of getting them to familiarize themselves with the facility. On the other hand, if the documents are lengthy and time-consuming to download, you might put off potential participants. Weigh the experience level of your participants and their familiarity with computer conferencing against the cost savings of online downloading.[4]

Confidentiality

For closed conferences, you'll need to clarify the issue of confidentiality right at the start. People may not contribute to the discussion as frankly if they think that the transcript will be used for some unknown future purpose, or that they'll be quoted. For the closed conference on workplace learning centres, we wanted a full and frank discussion in order to prepare a report on the findings. However, we knew that the discussion might be constrained if participants felt they were going to be quoted. Our solution? We summarized the discussion and included quotes without attribution. State your policy on confidentiality up-front; otherwise, people will operate on their own assumptions, with ramifications for the forum.

Unilingual or Bilingual?

All of the conferences I moderated were bilingual (i.e., the user chose whether to see the interface in English or French); all documents and major postings were available in both languages; moderation and technical support were available in both languages; and participants were encouraged to communicate in the language of their choice. However, in all but one conference, most participants posted comments in English only. The synchronous conference was the most successful in encouraging contributions in French. This was due to the high number of Francophones who actively participated, and the high level of bilingualism of the organizer. In the other forums, most Francophones posted in English to make sure their comments were understood by the other participants. Other approaches to the conference design, such as holding two separate conferences and posting summaries from one to the other, might encourage more participation.

Clarifying Expectations

The most important tip I can pass along is to make sure that all participants are clear about the expectations that you have of them, and what they can expect from you. This message cannot be communicated too often. For my first conference, I didn't do a good job of this one, and there was some confusion among participants as to their role in producing a document from the online discussion. This was my task, but I hadn't clearly stated my responsibility.

After this experience, I made a point of clarifying expectations up-front, for example what people could expect to get from the conference, and what we were asking of them. In the case of closed conferences, we asked people to commit themselves to spending a certain amount of time every week online. ("Some investment of time — approximately one hour — is required in learning how to use the facility. We are asking participants to commit five to10 hours a week to review the material and provide their opinions.") This request was communicated by letter and/or by phone, and restated online. In public access conferences, this message was delivered during the registration process by e-mail or phone, and online. For example, the objectives for the "Outcome Assessment in Learning" forum were set out on the registration page under "What will I get out of this forum?"

In the case of asynchronous conferences, it's also important to clarify expectations surrounding response time. Participant who post comments should be reminded that they may not receive a response right away. If

experts are going to be available to answer questions, it's important to establish "office hours," so that people don't expect an instantaneous response at any time of the day or night.

Technical Support

In these early days of computer conferencing, you'll find a wide variation in participants' comfort level with both computers and conferencing. For several of our conferences, we took a missionary approach to "pulling" people online. Once they had agreed to participate, they got support from me and from the technical support team until they signed on. In the process, we discovered the myriad of "technical" problems that can discourage people from participating — everything from not knowing how to use their Web browser to confusion over the conference interface. Don't assume that the medium is as transparent for everyone as it is for you.

For these reasons, it's essential to use a conferencing service that provides high-quality and user-friendly technical support. Establish from the start who will provide technical support to both you and the users, and the terms and conditions of that support.

Your need for technical support will be highest as people sign on to the system for the first time; that said, it will continue, albeit at a reduced rate, throughout the duration of the conference. I recommend obtaining full-time technical support during the sign-on period for a conference of short duration. Post sign-on, or in the case of conferences in which people sign on over an extended period of time, establish a reasonable timeframe during which participants can expect to get a response to technical queries. Make sure that all participants are aware of the timeframe.

Technical support should be available on-site through a Help button, and by phone for those who want to talk through a problem. For asynchronous conferences, it's very useful to have a Help conference item where people can post technical problems or tips, and share the information with all participants. For synchronous conferences, consider setting up a separate room for technical discussions, moderated by technical support staff. That way, it won't disrupt the flow of the substantive discussion.

No matter how much you encourage people to contact technical support, as moderator you will receive questions of a technical nature, either by e-mail or telephone. My advice is to refer all problems of a technical nature

to the technical experts (even if you think you know the answer!). This allows you to focus on your other responsibilities, of which there are many — read on!

Your Responsibilities

Moderating an online conference is very much like playing croquet with flamingos, as Dr. Richard Farson says at the start of this guide. The wonderful thing is that, no matter how much structure you put around the event, participants have their own agendas. Together, they'll give the conference a life of its own. That said, what are the specifics of your role in shaping this process?

Robin Mason uses extracts from Farson's conference to illustrate exceptionally good moderating in an educational context.[5] She refers to a conference on "Management of the Absurd" in her example. I recommend that you read the excerpt, to see what an excellent job Farson does, and just how context-specific the role of the moderator is. The role she plays in leading a course on "Management of the Absurd" bears little resemblance to stick-handling federal/provincial negotiations on student assistance reform. In order to assess how to best do your job, you'll need to take into account conference objectives, the type of participants and your own skill set. (See Influencing Factors on page 20).

Mason organizes the moderator's functions into three categories: Organizational, Social and Intellectual. Although I found some overlap, the categories did provide a useful framework.

Organizational

One of your jobs as moderator is to provide an organizational structure. You'll need to take on some of the following jobs before the start of the conference, some during the conference, and some once the conference is over.

Designing the Conference

When we began to structure our first online conference, we thought of approaching it like a face-to-face conference and addressing topics over time, as in a conference agenda. This approach doesn't work in a closed forum if you want everyone to address all the topics. Why? Because people

sign up at different points throughout the conference. That said, start times can be staggered — the topic is introduced once the paper is posted or the speaker is online, and left open until the conference ends.

With some asynchronous software, you can decide whether participants are allowed to start new items (i.e., topics for discussion) or only the moderator has this option. In making your decision, keep your objectives and participants in mind. We allowed participants to add their own discussion topics in all but the first conference. In retrospect, we should have allowed it in the first conference as well. The new items added value and were not unduly confusing, which was our original concern. But make sure you're consistent. In our first conference, we allowed participants to experiment with this option during a trial period, and then took it away. This caused confusion.

We used different methods to set up our structure in advance. For the closed conference on workplace learning centres, we canvassed participants in advance on high priority issues; we also left room for people to introduce their own topics. For the subsequent open forum, we followed the same structure. For open forums without an opportunity to canvas participants on topic priorities, the ability to thread topics seems to be very valuable (i.e., you're able to respond to someone immediately following their comment, thereby creating a subdialogue).[6]

Regardless of the extent of your prestructuring, it's important to be able to modify the structure as you go along. This is another reason to have technical staff on call to help with restructuring the site (e.g., linking content items under icons).

Organizing the Site

Participants should be clear on the conference objectives, on the timetable, and on what is expected of them. The set-up of the conference site should reflect this organizational clarity. When participants enter the site, they should be welcomed, and told that they're at the right location. Be clear about what they should do next (e.g., "Please introduce yourself under item # and then make a comment under item #." or "Please go to 'Read Me first.'").

Somewhere on the site, you need to reiterate the purpose of the forum and explain the structure.

If you're making background documentation available, it's useful to organize this material under icons, or use hotlinks to a separate site. These techniques reduce the visual clutter on the site.

Closure

Bringing closure to the conference is a very important organizational task for the moderator. Part of this task is also social. On the final day of asynchronous conferences, we posted good-bye messages early in the day and left opportunities for people to make final comments. If you've been successful at creating an online community, people need to take their leave by posting good-byes or final thoughts; this provides them with some form of closure. With the synchronous conference, we devoted the final hour to a dialogue about the experience.

Let people know what they can expect next. Will there be a final report? How can they access it? Can they come back to the forum site to read it? How long will the site remain accessible? Are there plans for future events? Some participants may want to continue the discussion, or sustain this gathering of like-minded people. As a follow-up to the synchronous conference on "Outcome Assessment in Learning," the organizers set up a listserv in order to foster a community of interest.

Adjust the Pace

In her article, "Ten Ways to Make Online Learning Groups Work,"[7] Lisa Kimball talks about how important it is for the moderator to adjust the pace of the proceedings. A subgroup of participants may interact at such a rapid pace that people who only sign on infrequently will have a hard time catching up. Kimball recommends slowing down the pace by providing cues that let participants know which items are hot and active. She suggests putting this information in an special file or in the first conference message; alternately, you could send out periodic e-mail updates, or make the current agenda available so people can see what's going on.

Our solution was to provide periodic summaries of the conference proceedings. These detailed summaries allowed those just entering the conference to find out what had been said under each topic. The summaries also allowed regular participants to identify patterns in the contributions and kept them from getting lost in the details. The summaries had three

components: a summary of the discussion, outstanding items (e.g., "Sharon has asked whether anyone has a suggestion on X.") and a leading question designed to stimulate further discussion.

Managing Interaction

An important organizational duty is to manage the interaction. This is done by providing leadership and, in the concrete sense, by managing the Web site. There will be times when the conference stumbles and people aren't sure what to do next. The moderator should be there to provide a steady hand. This can include affirming or clarifying statements in response to questions such as, "Are we supposed to be ...?" In addition, the moderator should monitor the need to introduce new topics, close items that have grown too large to manage, or reword a confusing message.

Social

The best way to sum up the social aspects of your job as moderator is to call it "creating a community." This can be challenging in the text-based environment of an online conference. Tony Di Petta reminds us that communicating in such an environment, without the visual or auditory cues that form 70 per cent of face-to-face communication, doesn't come naturally to most people.[8] Your goal is to get people to interact with you and with other participants to form an online community. Within the trusted boundaries of a community, people are more likely to be at ease; they'll make the most of their participation and open up to others. To help them do this, you need to set the tone, establish trust, prompt input and monitor netiquette.

Setting the Tone

Participants will form impressions about the conference as soon as they enter the site. As moderator, you have the most significant influence over setting the tone. The cues that will influence a participant's initial impressions include the physical look of the site, the wording of the welcome text, and the nature of the interactions between you and participants, and among participants.

Try to make the site look user-friendly and inviting. Make your welcome text as non-intimidating as possible.

Early exchanges between the moderator and participants, and among participants, are very important in setting the tone. In these exchanges, you're modeling the type of exchange you're expecting. People will tend to follow your lead. Can you be fairly informal? If so, address participants by their first names. In your responses, let your personality show through to encourage others to do the same.

The moderator has many opportunities to model good behaviour through verbal rewards (e.g., "Thank you for posing that technical question — I'm sure many people have been struggling with the same problem." or "Thank you for stating your disagreement with the approach in such a positive way, and for suggesting concrete solutions.").

The use of humour works extremely well to create a supportive atmosphere; it's terrific if you can pull it off. However, it can be tricky conveying humour effectively in a text-based environment, hence the popularity of emoticons. In the synchronous conference I moderated, emoticons were used extensively because people were communicating very quickly, they didn't have time to craft their comments carefully and didn't want to be misunderstood. Emoticons were rarely used in my asynchronous forums because people had the time to craft nicely phrased sentences to carefully convey meaning. My advice is to introduce humour gently and delicately, and be prepared to pull back if you feel it's not working.

Establishing Trust

Putting thoughts down in black and white for the edification of an invisible audience requires a great deal of trust — trust that your words will be interpreted as intended, and trust that people will give you the benefit of the doubt and try to understand what you meant to say, even though you may not have expressed yourself with total clarity. People may be uncertain as to how they will measure up to their fellow participants. Will they be as knowledgeable or articulate as everyone else? You need to spend a good deal of time rewarding people for expressing themselves and, in this way, establishing their trust. Spend time affirming and confirming participants' comments; give them verbal rewards for sticking their necks out.

I feel it's important to acknowledge everyone personally the first time they sign on. It's a way of saying "Hello, we hear you and we're glad to have you with us." People have a good many apprehensions the first time they sign on — everything from "Am I doing this right?" to "Are people interested in what I have to say?"

During the conferences I moderated, I made a point of referring to people by name when responding to a suggestion or building on an idea. There can be a sense of being invisible; people who make comments that are simply left without response — especially if they're new to online conferencing — might not come back. They will tentatively put forth an idea and feel rejected if no one picks up on it.

I found that people needed to see their input in the summaries. They felt this validated their participation (e.g., "I saw that you quoted me in the summary. I'm glad I was able to contribute something.") Don't underestimate people's apprehension when exposing themselves in this medium. I was very surprised when a highly skilled participant confessed that he was relieved to see his input used in the final document. He had begun to harbour doubts about himself when he got the background paper before the conference started. He felt the paper was written in an "academic style" and that this was not where his strengths lay.

Prompting Input

People often need to be encouraged to participate actively in an online conference. It's important for the moderator to be extremely active during the early stages of the conference to encourage interaction — somewhat like priming the pump. During the conference, you'll need to take special care to draw in less active participants. I often questioned a participant by name and sometimes would follow up with an e-mail. My summaries of the conference proceedings included reminders in those cases where we were still waiting to hear from someone in response to a question. To do this, I had to be aware of their agendas. This way, we didn't leave questions hanging for days without a response. Instead I could say, "We'll pose this question to Joe when he's back online after X date."

Conferencing systems such as Caucus allow the moderator to see who's lurking. Knowing when people last signed on let's you see who is reading but not participating. You can then contact them directly to find out why. We found that you can't make any assumptions about why people aren't participating. Some will have technical problems, some will have difficulty knowing how to interact, and others won't be able to fit it in with work and travel commitments. Don't forget that being Web-based, there are no reminders that the conference is there. It can be easy to forget, especially in the face of more immediate and pressing demands.

With some conferencing software (e.g., Allaire Forums), participants can be notified by e-mail about new messages posted to the conference. This feature provides an excellent way to remind participants about the conference, and encourages them to revisit the site.

I've found that asking everyone to begin the conference by introducing themselves is a good way of prompting interaction. This exercise serves several functions: it's an ice breaker; it forces people to learn how to interact with the interface; it lets everyone learn more about their fellow participants; and it gives the moderator information that can be used to pull people into conversations.

Netiquette

Educators offering online courses sometimes provide their students with pointers on "netiquette" (online or network etiquette). According to MaryAnne Andrusyszyn, one should "avoid writing in capitals, since it implies you are shouting; avoid language that is condescending, hostile, inflammatory, racist or sexist; personalize words with the use of emoticons; [not] assume that everyone will know what you are talking about; compose your thoughts clearly; be respectful of others' opinions, beliefs, and values; [not] dominate discussion; and be supportive of others by encouraging and praising contributions."[9] This is the atmosphere you're trying to create; however, it's unlikely you'll need to make these points to your adult participants.

All the forums I moderated involved groups of peers; people were on their best behaviour and anxious to present themselves in the most favourable light. I never had to reproach anyone for inappropriate behaviour.

However, both the asynchronous and synchronous conference facilities provide tools to deal with such problems. With Caucus, Allaire Forums and many other packages, the moderator can change the text of any item or response, regardless of who entered it. For example, if an interpersonal problem occurs, you can censor parts of the discussion.

The synchronous conference I moderated had been designed originally for young people; the moderator was able to prevent an individual from speaking (i.e., typing in their input). A sign would appear on the problem child's screen, saying "Sssh." The participant can still see the proceedings but cannot contribute. Needless to say, I didn't find it necessary to use this feature with adult participants.

If you have concerns about netiquette, send an e-mail stating the rules of the conference to participants when they register. The e-mail should be addressed to each person individually rather than as part of a general broadcast. The e-mail should include the request that people contact the moderator for clarification of the ground rules, or if they feel they can't abide by them. Make the e-mail very specific, providing examples of the exact nature of your concerns. Once the proceedings start, you can remove offending text with some conferencing software. Contact the person directly to discuss the problem. Even with a public access forum, people need to register; those who don't follow the ground rules can be blocked from participating.

Intellectual

As moderator, your chief intellectual task will be to contribute to knowledge-building. In addition, you may have designated tasks specific to the objectives of your conference, such as preparing ongoing summaries and/or a final report.

In order to facilitate knowledge-building, you must begin by really listening. We can be misled when people use the same words to mean different things. It's too easy to think they mean the same thing. One of the important up-front tasks in knowledge-building is to probe and clarify. Once this is done, you can begin to link ideas.

"Weaving" is one of the terms used to describe this process of synthesizing multiple responses in online conferencing. Robin Mason says, "Weaving together the often disparate concepts, so typical of the medium, is acknowledged to be one of the most highly prized skills of educational computer conferencing."[10] She includes the following quote from Feenberg: "Such weaving comments supply a unifying overview, interpreting the discussion by drawing its various strands together in a momentary synthesis that can serve as a starting point for the next round of debate. Weaving comments allow[s] online groups to achieve a sense of accomplishment and direction. They supply the group with a code for framing its history and establish a common boundary between past, present and future. (Feenberg, 1989)

By combining these three sets of tasks — organizational, social and intellectual — you're aiming to achieve what Tony Di Petta calls synergy — "that special moment in the life cycle of a group when the whole becomes greater than the sum of its individual parts and when everything and everyone is working in harmony to meet the goals of the conference."[11]

Influencing Factors

A number of factors are going to influence the outcome of your online conference. These include the characteristics of the participants, their motivation and your characteristics as a moderator.

The Participants

Here are some of the important elements of the group's composition that will affect the online conference: ease of social/technical access, perceptions of fellow participants and previous history. The motivation factor is so significant that I'll deal with it on its own.

Ease of Social/Technical Access

Many factors will influence the ability of the participants to access the forum. Do they have access to an adequate computer? Do they have sufficient skills to handle the technology and the tasks?

Perceptions of Fellow Participants

The way people perceive their online community has an obvious effect on the nature of the dialogue. In the conferences where we assembled experts, we were putting people together with their colleagues. They were talking to potential employers, competitors and peers in a context where they assumed their input was being assessed. This motivates participants to generate high-quality information of a superficial nature (e.g., tips on hardware and software). It's a much tougher environment in which to openly question and explore the validity of their own or someone else's approach to a particular problem.

Previous History

I moderated one conference where the participants had a history of dealing with one another, often across the negotiating table. As a result, there was some concern that the conference would turn out to be a confrontation rather than a dialogue. For the most part, these fears did not materialize; as the conference progressed, a very collaborative environment was created. How? By fostering a welcoming environment and modeling of positive responses, coupled with concrete evidence that people's comments were being taken seriously (e.g., the agenda of the upcoming face-to-face meeting was changed in response to participants' input).

Motivation

Motivation brings the most weight to bear on the role of the moderator. Moderating a forum of active, highly motivated participants puts you in the role of traffic cop, synthesizer and focuser. You're trying to keep the activity structured so that people don't get lost. You need to focus on clarifying, summarizing and structuring new strands of discussion.

In the closed forums I moderated, the motivation was high for a combination of the following reasons:

High need for the information: Those who participated the most were those who had the greatest need for the information, and those who could actively apply it to their work.

Sense of responsibility: In the closed forums, people had agreed in advance to participate and clearly felt a need to fulfill their commitment. Those who were participating in a professional capacity needed to make sure they represented the interests of their organizations. In the closed forums, people also seemed to feel a sense of responsibility to their fellow participants.

The "O.K. I'll get to it" syndrome: In two of the forums, we were actively encouraging people to participate; several people came online in response to our repeated calls and e-mails.

Moderating a forum of inactive participants is a lot like moderating active participants if the objective is simply to provide people with an opportunity to make their views known (i.e., whether they do or don't is up to them). Your task is the same; it's just easier because there's less to do.

However, if the objective of the exercise is to create a dynamic event with high-quality content, it can be challenging in an open forum where motivation is low. In a face-to-face conference, a very small percentage of people speak. It's acceptable to lurk (i.e., watch the proceedings without contributing), as it should be in certain online forums. Lurking in an online forum is a very pragmatic approach to information gathering. This is one of the few mediums where you can arrive at the last minute and download a transcript of the entire proceedings with a push of a button. (Sure, you can purchase conference proceedings, but those PowerPoint handouts pale in comparison to a transcript.) As long as you're assured that other people are asking the kinds of questions you're interested in, why do more?

Given this fact, and people's frantically busy schedules, the moderator needs to create a stimulating and compelling environment. You might have to do this single-handedly (depending on whether there are expert participants), with some help from those participants who are committed to putting time and effort into the experience.

The Moderator

To succeed at the intellectual tasks, how important is it that the moderator be a subject matter expert? I had significant content knowledge in all but one of the forums. In the one where I did not, participants had a history of dealing with one another, often across the negotiating table. The conference organizer concluded that, in this case, there was value in having a moderator who had no vested interest in the issue. "Your job as moderator is probably enhanced by not knowing the details of previous conflicts. You can ask questions from the perspective of a naïve observer, which should help bring an air of objectivity to the discussions." That said, I'm more comfortable having a solid understanding of the topic, and briefed myself before moderating the conference. Nevertheless, I would conclude that content knowledge, although it helps, does not seem to be a prerequisite for the moderator's job.

For synchronous conferences, there is real value in having co-moderators — one who is a subject matter expert, and one who concentrates on managing the discussion and dealing with private messages from participants. We couldn't have handled our 16-hour synchronous conference without using this approach.

Here is another factor to consider. Your personality type as a moderator may or may not be in sync with those of the group you're moderating. For example, consider what might happen when a conference moderator who is predominantly an Extroverted Sensing and Thinking type is assigned to a group of predominantly Introverted Intuitive and Feeling members? Tony Di Petta uses this example in his paper "Psychological Type as a Tool for Online Groups" (http://node.on.ca/conferencing). Di Petta worked with moderators from the Education Network of Ontario to help them understand how awareness of their personality type could help them in their online work facilitating group discussions. The tool he used was the "Performance Effectiveness through Type (P.E.T.) 7" inventory. Di Petta reports that type training and awareness can help the moderator focus online communication

to the specific preferences of individuals or groups; they can also facilitate the moderator's work in establishing connections between and among the members of an online group.[12]

Conclusion

Listing all the tasks which must be undertaken by the moderator of an online conference make them seem daunting. But you can ignore all this good advice and still be a good moderator. Here is what the research shows.

> What we have learned is that when a leader enters with enthusiasm and passion and commitment and a real interest in conveying what he knows about this material, that more than accounts for the success of the conference. That kind of moderator can violate all sorts of other "rules," and still have a successful conference. People can tell, in other words, when the leader is present as a person, and when he isn't. Participants will forgive a long-winded discussion — comments that run for two or three pages — from a leader that is passionately interested in the conference, in what he is doing and in trying to convey ideas to the group and being responsive to their ideas. That carries the day. So I would say, much more important than skill is commitment, passion, involvement, absorption in the conference.[13]

And the one thing I haven't adequately conveyed is just how much fun it is to moderate online conferences. I've found the experience exhilarating. We're just beginning to understand the qualities of this new medium, but I find it has an intimacy and an immediacy that can make for a very intense and very satisfying experience. Enjoy!

APPENDIX A

Resources

The NODE is a not-for-profit electronic network which aims to facilitate information and resource-sharing, collaboration, and research in the field of learning technologies for education and training. For examples of the asynchronous facilities referred to in the guide, log onto their Web site at http://node.on.ca/conferencing/

NODE's Technologies for Learning site (TFL) features pages dedicated to "Conferencing and Chatware." A section called "Notes From the Field" includes reports detailing the experiences of those who have used conferencing and chat technologies in developing and delivering post-secondary courses. See http://node.on.ca/tfl/conference/fieldnotes/

The following papers are referred to in this guide, and can be accessed from this site.

- "Instructor's Guide to Computer-mediated Conferencing," by MaryAnne Andrusyszyn.
- "Psychological Type as a Tool for Online Groups," by Tony Di Petta, an abridged version of a chapter, "Type as a facilitation tool in computer conferencing," in Cranton, P. (ed.) (1998). Psychological Type in Action, Psychological Type Press, Sneedville, TN.
- DEOSNEWS Vol. 1 No. 19. The Distance Education Online Symposium, "Moderating Educational Computer Conferencing," by Robin Mason, Institute of Educational Technology, The Open University.

http://www.cnet.com/Content/Builder/Business/Community/?st.bl.fd.busz.fe

This Web site focuses on building online communities, and features 10 tips for building online communities and five case studies of online communities.

http://star.ucc.nau.edu/~mauri/moderators.html#cmcbooks

The Moderator's Home Page provides resources for moderators and facilitators of online discussions.

http://thinkofit.com/webconf

Conferencing on the World Wide Web reviews Web software for asynchronous group discussions, including resources and examples.

"Ten Ways to Make Online Learning Groups Work," by Lisa Kimball, reprinted from Educational Leadership, Vol. 53, Number 2, October 1995.

Notes

1 Interview with Dr. Richard Farson, quoted in "Moderating Educational Computer Conferencing," by Robin Mason, Institute of Educational Technology, The Open University, DEOSNEWS Vol. 1 No. 19, The Distance Education Online Symposium.

2 Note: Cost-effective applies equally to both these online modes because they are both textbased, requiring little bandwidth and low-end computers to operate.

3 For a review of asynchronous software, visit Conferencing on the World Wide Web, a Web site reviewing Web software for asynchronous group discussions, including resources and examples at http://thinkofit.com/webconf

4 Terry Anderson makes the following observation about circulating information in advance: "Since most people read longer documents on paper, costing shifts to the participants. The arrival of a package by mail cues that an important event is about to commence and shows the preparation and value attributed by the organizers."

5 R. Mason, *ibid.*

6 For examples of a threaded (Allaire Forums) and nonthreaded (Caucus) see http://node.on.ca/conferencing

7 Educational Leadership, Vol. 53, Number 2, October 1995.

8 "Psychological Type as a Tool for Online Groups," by Tony Di Petta at http://node.on.ca/tfl/conference/fieldnotes

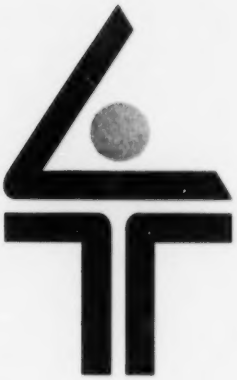
9 "Instructor's Guide to Computer Mediated Conferencing," by MaryAnne Andrusyszyn at http://node.on.ca/tfl/conference/fieldnotes

10 R. Mason, *ibid.*

11 T. Di Petta, *ibid.*

12 T. Di Petta, *ibid.*

13 R. Mason, *ibid.*



http://olt-bta.hrdc-drhc.gc.ca